



PORTAL GUIDE FOR END USERS

SYMPLR COMPLIANCE

1. ACCESS INCIDENT MANAGEMENT FORMS

Note: A video tutorial of this guide is available [here](#).

The direct link to all forms: <https://totalhealthcare.cqs.symplr.com/portal>

Individual Form Links:

Employee Only Incident Reporting Form:

<https://totalhealthcare.cqs.symplr.com/Portal/CreateForm/450044>

Employee Only Grievance Form:

<https://totalhealthcare.cqs.symplr.com/Portal/CreateForm/450049>

Patient Complaint Form:

<https://totalhealthcare.cqs.symplr.com/Portal/CreateForm/450047>

Patient Grievance Form:

<https://totalhealthcare.cqs.symplr.com/Portal/CreateForm/450048>

2. OVERVIEW

1.1 INCIDENT MANAGEMENT PORTAL

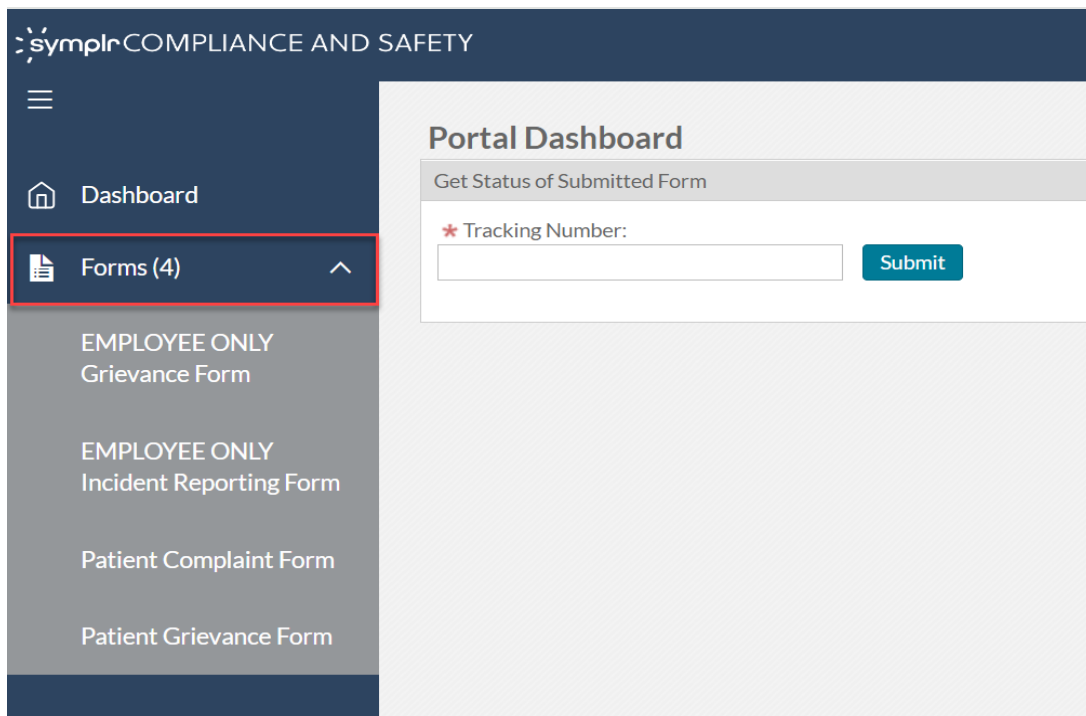
The Incident Management Portal is where published forms can be accessed to submit individual instances of events/incidents.

To access the Incident Management Portal, type

<https://totalhealthcare.cqs.symplr.com/Portal> in the browser address bar.

1.2 CREATING AN INCIDENT

1. From the sidebar, expand the Forms menu. A list of available forms will populate.



2. The form selected will populate on the screen. A form is made up of several fields to capture information about the incident. The fields marked with a red asterisk (*) are required. Enter the required fields and any other necessary fields.

New: EMPLOYEE ONLY Incident Reporting Form

Form Attachments

Please complete for all incidents and near misses. If you are a login user, you will be able to save your form as a draft to return to before submitting. If you are not a login user, you must complete and submit the form in one sitting, you will not be able to save before submitting.

Please only state facts in your report. Indicate any quotes with quotation marks (" ").

* Incident Type:

<input type="checkbox"/> 340b	<input type="checkbox"/> Abduction/Elopement (unauthorized departure)	<input type="checkbox"/> Abrasion	<input type="checkbox"/> Bleeding
<input type="checkbox"/> Burn/Scald/Blister	<input type="checkbox"/> Clinic Medication Error	<input type="checkbox"/> Contusion	<input type="checkbox"/> Cut/Laceration
<input type="checkbox"/> Electrical Shock/Burn	<input type="checkbox"/> Equipment	<input type="checkbox"/> Fall Related	<input type="checkbox"/> Fire/Smoke
<input type="checkbox"/> Latex Allergy	<input type="checkbox"/> Loss of Consciousness	<input type="checkbox"/> Needle Stick	<input type="checkbox"/> Pharmacy Medication Error - Near Miss
<input type="checkbox"/> Pharmacy Medication Error - Reached Patient	<input type="checkbox"/> Physical Assault	<input type="checkbox"/> Rapid Response	<input type="checkbox"/> Rash/Hives

3. If needed, documents can be attached to an incident form. Select the **Attachments** tab at the top of the screen. To add documents, select the **Add File** button. Documents can be dragged from a file interface or selected by browsing through a file interface. Once the document/s has been added, select **Upload Files**.

Form Attachments

Add File

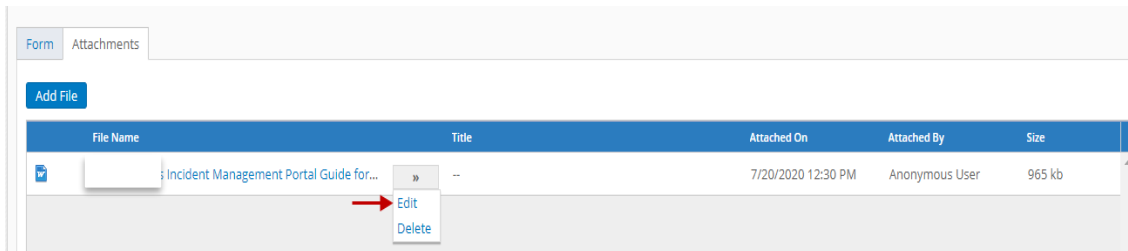
Upload Files

Drag your files here to start uploading

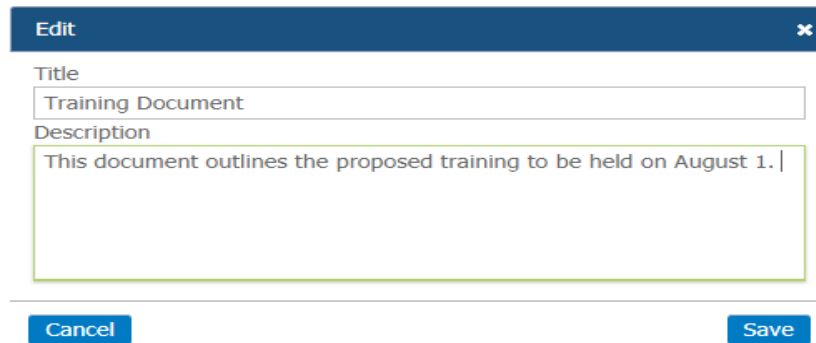
Cancel Select Files Upload Files

Attached By	Size
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4. All documents attached to the incident form will be listed in the **Attachments** tab. Once uploaded, the file can be deleted or edited by selecting the corresponding link.



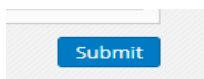
5. From the **Edit** screen, the title of the document can be modified and a description can be added.



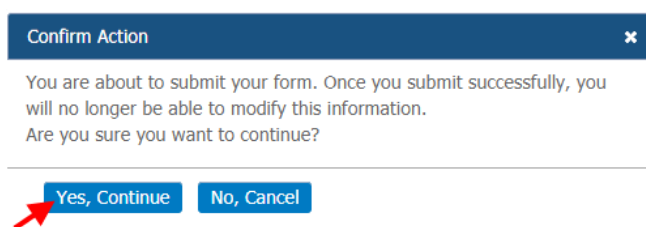
The screenshot shows an 'Edit' modal window. It has a title bar with the word 'Edit' and a close button. Below the title bar, there are two input fields: 'Title' and 'Description'. The 'Title' field contains the text 'Training Document'. The 'Description' field contains the text 'This document outlines the proposed training to be held on August 1. |'. At the bottom of the modal, there are two buttons: 'Cancel' and 'Save'.

1.3 SUBMITTING AN INCIDENT

1. When completing a form anonymously, the only option will be to **Submit** the form at the bottom of the page.



2. After clicking **Submit**, you will then be asked to confirm by clicking **Yes, Continue**.



The screenshot shows a 'Confirm Action' modal window. It has a title bar with the text 'Confirm Action' and a close button. Below the title bar, there is a message: 'You are about to submit your form. Once you submit successfully, you will no longer be able to modify this information. Are you sure you want to continue?'. At the bottom of the modal, there are two buttons: 'Yes, Continue' and 'No, Cancel'. A red arrow points to the 'Yes, Continue' button.

3. Upon submission a **tracking number** will be provided. **Save the tracking number** to check on the status of the anonymous form submitted.

Confirmation ✕

Your form was submitted successfully.

Please use the tracking number, provided below, to check the status of your submission in the future using the "Get Status of Submitted items" section on the Homepage.

Tracking Number: 7gZlgIcZrD

[Close](#)

4. To **check the status** of a submitted form, enter the tracking number on the Portal Dashboard and click **Submit**

Portal Dashboard

Get Status of Submitted Form

* Tracking Number:

[Submit](#)

A status window will then appear with the information related to the tracking number entered.

Status ✕

Tracking Number: y1pcpqmDfi

The status for the form **Event** submitted on **3/10/2021**, associated to the tracking number above is **"Complete - On 3/10/2021"**.

Resolution: Pending

[Add Comment](#)

Date & Time	Comments	Added By
No data to display		

[Close](#)